

# Checklist for Planning Events\*

## 1. Important tips

- Share information. Keep people informed who need to be informed.
- Clearly communicate roles and expectations of everyone involved. Provide people with the information they need (e.g., e-mail updates, correspondence with external partners, etc.)
  - Do not assume that people read their e-mail or receive their faxes. To ensure communication of timely items, talk with the person directly. Follow-up with e-mail confirmation if necessary, particularly if others need to be copied regarding the conversation outcome.
- Be responsive to one point person. There should be one point person in charge and everyone should respond to that person.
- If this is an event that will occur multiple times, document the planning process and create a guide that can be used the next time around making sure to add pages for additional improvements.
- Create a checklist and a timeline for the all the things that need to be done. Cross things off the checklist as they have been completed. Refer back to the timeline to assure that the planning is on schedule. This will avoid rushing to get things done at the last minute.

## 2. Details to consider first

- Determine the goal of your event. What do you hope to achieve through this event? How will you create an event that accomplishes this? Are there additional goals?
- Evaluate event. Make sure the purpose for the event is important enough to merit the time and expense needed to properly stage, publicize, and evaluate the event.
- Determine your target audience. Include groups that have a special stake in the event.
- Determine who the event “decision-makers” will be, as well as everyone who needs to be involved in the event planning. Also discuss how information and changes will be communicated.
- Create a budget. This should be specific and include revenue opportunities (sponsorship, ticket sales, donations, and concession sales) as well as expenses (printing, permits, insurance, speakers, food, supplies, and security).

\* Different types of events require different types of preparation. This document provides general guidelines and may not cover all the details relevant to your event.

## 2. Details to consider first cont...

- Know your venue capacity. Figure out how many people the space in which your event is being held can accommodate before inviting people.
- Make sure you have enough time to properly plan and organize the event. A poorly organized event may do more harm to the public's perception than not hosting the event at all.

## 3. Create the event schedule

- Set the date. It is important to get your event on people's calendars and reserve a space as soon as possible. Before reserving any necessary accommodations, consider the following:
  - Check with other organizations to find out potential date conflicts.
  - Check with key stakeholders. Be sure that the important people that you would like to reach with your event are actually able to attend.
- Once the date is set, notify staff and key stakeholders immediately. If involvement and/or attendance of staff are desired, let them know in advance.
- Create your planning calendar. Take the time to plan out EVERYTHING that needs to happen for your event to be successful and set deadlines for when these steps need to be completed.
  - Make deadlines for external people 4 or 5 days before your actual deadlines. This will allow additional time to adjust if they miss the date.
- Maintain a checklist to keep track of what you have accomplished and what needs to be done.

## 4. Send out invitations

- Think through the following details before inviting people to attend or to participate in the event:
  - Who is your target audience? Why would your intended audience want to attend /participate? What is the incentive for them? What information will they want to know?
  - What are you inviting people to do, i.e., attend event, participate as vendor or speaker?
  - What will be happening at this event? Will there be food, is there an admission fee?
  - Where will the event be held? Be sure to include directions, or information on public transportation if necessary.
  - When does the event begin? How long will it last?
- Decide how the information will be distributed. This could be e-mail, mailed invitations or letters, faxes, personal phone calls, or flyers.

#### 4. Send out invitations cont...

- Consider your target audience and their preferred mode of communication.
- Consider the amount of time you have. If your time is limited, consider using faxes, e-mails, phone calls, or flyers.
- If you will be sending invitations through the mail, arrange for postage in advance.
- Create the invitation. Draft e-mails; design invitations, flyers, or faxes; or write phone scripts. Include special instructions for details such as parking and a phone number in case individuals have questions.
- Compile guest list and collect contact information.
  - Who should be invited? Who are you trying to reach?
  - How many people can your venue comfortably hold?
  - Double check numbers, addresses, and spelling. Be sure that you do not send duplicate invitations.
- Create a document to keep track of invited participants and their responses. Keep records of who will and will not be participating and note any special considerations they may need.

#### 5. Take care of logistics

- Arrange for utility support as needed. Make arrangements if necessary for AV equipment, LCD projector and screen, videoconferencing, etc.
- Coordinate setup. Make accommodations for tables and chairs, displays, parking, or other special considerations as needed.
- Create any necessary signage. Consider welcome, navigational, or motivational signage.
- Transportation. Offer driving directions and parking suggestions. If free parking is not available, consider making parking arrangements for key event participants.
- Reserve rooms where needed.
- Arrange for refreshments and meals if needed.
- Carefully think through any remaining details, such as post-event clean-up, whether or not name-tags are appropriate, emergency plans, etc.

#### 6. Materials needed

- Determine if any supplies need to be ordered or can be prepared in advance (e.g., stamps, name tags, table tents, etc.)
- Determine what communications materials are needed during the event.
  - Communicate when information is due and to whom in order to ensure timely production of needed materials.
  - Clarify how the materials will get produced and disseminated.

## 6. Materials needed cont...

- Double check accuracy before disseminating.

## 7. Other details to consider

- Potential media interest?
- Consent forms required? Attention to HIPAA regulations?
- Webpage? You may want to post an announcement on your organization's website.

## 8. Week before event

- Contact distinguished guests and vendors to confirm attendance.
- Create an itinerary that outlines what will occur during the event and distribute this to those involved in, or working on the event.
- Carefully review your planning calendar to be sure all important tasks are complete, and create a checklist of everything you need to take with you, or set up for the event.

## 9. Wrap-up

- Send thank-you letters. These should go to anyone who donated time or money to the event.
  - Track the thank-yous that have been sent so you can be sure that the appropriate individuals received one. You may create an Excel spreadsheet to track when these were done and/or photocopy all mailed correspondence.
- Evaluate how everything went directly after the event while the details are fresh. You may want to consider having a questionnaire for participants to fill out. Some general evaluative criteria include:
  - Did the event fulfill its goals and objectives? Why or why not?
  - Identify what worked and what needs fine-tuning. Which vendors should be used again?
  - What items were missing from the checklist?
  - Was the event well attended?
  - Was informal and formal feedback about the event positive?
  - Was the benefit proportionate to time/effort expended?